SCHEDULE FOR THE CREATION, DEVELOPMENT AND TESTING OF THE RETIREMENT COUNSELING PROGRAM

June 1967 to June 1969

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July, August & September 1967 - <u>The Concept Period</u>

1. Discussions with senior Agency officials to determine scope of assigned task.
2. Read, research and contact ouside organizations to develop breadth and depth for foundation and direction.
3. Lay an initial plan and test its validity.
4. Discuss projected program thoroughly with each Deputy Director for reaction and insight into career service policies and variations in intentions, procedures and personnel handling.
5. (No staff was available for the Program at the outset. On 24 June [redacted] informed a priority task would be to round up a team of supporting officers and secretarial assistance.)
6. During these three months, meet with Deputy Director and request two senior officers with broad backgrounds in the directorate to work on the Program for one to two years.
7. Have all members of the team designated by late September. (The last two officers reported in on the 18th and 20th of October.)
8. Acquire office space. (A temporary office in Ames Building and space in the Magazine Building were allocated and the office in Ames was occupied in September.)

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October, November & December 1967 - <u>The Fact Finding & Research Period</u>

1. Locate and assemble background information, from both inside and outside the Agency; collect pertinent statistical reports; extract and cross reference important details.
2. Interview all Agency retirees - Oct. through Dec. 1967 - for insight into problems and approaches

toward their solutions, and for testing the inclusiveness and emphasis of the original plans.

3. Establish the areas of concentration in order to make a frontal assault on the entire Program.
4. Breakdown the areas of concentration into work sectors.
5. Assign responsibilities based upon observation or interest, motivation and initiative.
6. Prepare at least an initial organization of files based upon areas of activity and responsibilities, to permit efficient control, distribution and later use by the entire staff.
7. Develop bibliography and launch a program to acquire two locations for Retirement Reading Rooms; from the bibliography commence the acquisition of an essential basic collection (2 copies) for the reading rooms.
8. Arrange an orderly means for keeping D/Pers and DDS informed through briefings and periodic status reports, the latter to contain sufficient attachments and detail to serve as a mechanism for informing the staffs of the Deputy Directors.
9. Meet with the chief of each career service to discuss his unique requirements and explain the possible assistance available in the RCP.
10. Brief every career service board and the planned relationships between it and the Retirement Counseling Program.

January, February & March 1968 - <u>The Period for Techniques and Tools</u>

1. Begin the preparation of format and identify content catagories of a Retirement Newsletter.
2. Plan a publicity campaign - bulletin boards, cards on cafeteria tables, slips with checks, posters - present retirement in a positive light certain aspects of which should receive consideration and advance planning years before expected retirement.
3. Relate the employee's dependents to the program.
4. Plan seminars.
5. Draw up counseling procedures and methods, include support of other Agency components such as OTR, OS, CCS, OF, and CRS.
6. Commence the systematic counseling of 1968 retirees, and refine our earlier interviewing techniques.

7. Assemble kits of important retirement pamphlets and leaflets to be provided the retirees.
8. Prepare an unclassified Retirement Information Pamphlet for all employees for use in the office or at home.
9. Assemble necessary information and produce a guide to the various retirement assistance office with the matters for which each is responsible.
10. Prepare a special seminar for 1968 retirees to be given as early in 1968 as possible.
11. Develop closer working arrangements with the Career Services for communicating with retirees, and exchanging retirement information and questionnaires.

April, May & June 1968 - <u>Procedure and Workload Analysis Period</u>

1. Acquire the retiree lists for the years 1968, 1969, 1970, 1971, and 1972 from the career services.
2. Compare these lists with machine runs; note variations and set up special procedures to aid the typical retirees.
3. Set up enabling procedures for using outside knowledgable persons (preferrably former Agency personnel) as consultants: Retiree Association, Re-employment Potentials, Individual Re-employment assistance, etc.
4. Prepare initial drafts of internal working procedures for the responsibilities of the RCP Staff.
5. Develop flow charts of relationships between RCP Staff and other offices; include our support to them and their responsibilities in support of the RCP Staff and the Retirement Counseling Program.
6. Complete the identification of the statistics from the various RCP Staff activities; note those which need not be kept, those which should be kept informally or for a limited time as being of internal benefit to the RCP Staff, those which should be kept as perminant record, and those which have a greater value and should be retorted forward routinely on a periodic basis.

July, August, & September 1968 - <u>Staff Reorganization & Program Testing Period</u>

1. Analyse Retirement Program in depth: the nature of the program; effectiveness of various parts of the

effort; proper density and workload balance; nature and levels of working relationships with others; clarify responsibilities eliminating, transfering and coordinating as necessary.

2. Examine the magnitude of effort in each activity and determine the number of persons required to efficiently carry it out. The present austerity compels projection of the barest minimum number persons to carry out all functions.
3. Consolidate functions and activities where possible and related, for greatest efficiency and conservation of manpower.
4. Prepare job descriptions.
5. Submit proposed Staffing Pattern and assignment recommendations.
6. Continue interviews with 1968 and 1972 retirees.
7. Hold one of the regular seminars, preferably the medical seminar in collaboration with Dr. Tietjen.
8. Expand "Alumni Association" concepts and prepare external facility to eventually serve as correspondence center give placement assistance, set up group insurance program, establish an Agency supporting Foundation, etc.

October, November & December 1968 - <u>Adjustment and Regulatory Period</u>

1. Refine procedures into OP or Agency regulations.
2. Conduct additional seminars applying experience gained early in 1968.
3. Set up annual seminar series; prepare it for launching in 1969.
4. Prepare final set of questionnaires for use in annual approach to retirees while they are in the five year counseling zone.
5. Complete the review of the Retirement Information Pamphlet, issued in draft to 1968 retirees, making full use of suggestions from Career Services and from the retirees and their wives who have used the Draft Pamphlet (Xerox).
6. Review experience with publishing 1968 copies of Retirement Newsletter and prepare the patterns and procedures to be followed.
7. Complete staff studies and recommendations of legislation and regulatory changes to strengthen the Program.

January - on 1969 - <u>Refinement and Rounding Out of the Program</u>